



# Italy: the LGBTQ+ travelers' experience

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# Introduction

This study analyzed the behavior of almost **1,000 LGBTQ+ travelers** (mainly North American and European) in order to:

- understand what are the **top of mind holiday destinations**;
- assess the **perceived LGBTQ+ friendliness of 8 European countries** and compare **Italy** to its main competitors;
- investigate the **travel behavior of LGBTQ+ people on vacation in Italy**;
- get some general **insights on LGBTQ+ holiday behavior**.

Answers were collected through a **CAWI survey** promoted on different channels between **May and August 2022**.

The survey asked **30 questions** in 4 sections (profile, Italy's competitive set, travel experience to Italy, travel behavior).

In order not to affect the responses, **the questionnaire did not state what was its main focus: Italy**.

This study was carried out within the **Master in Tourism Economics and Management** for **AITGL** in partnership with **Sonders&Beach** and **IGLTA Foundation**.



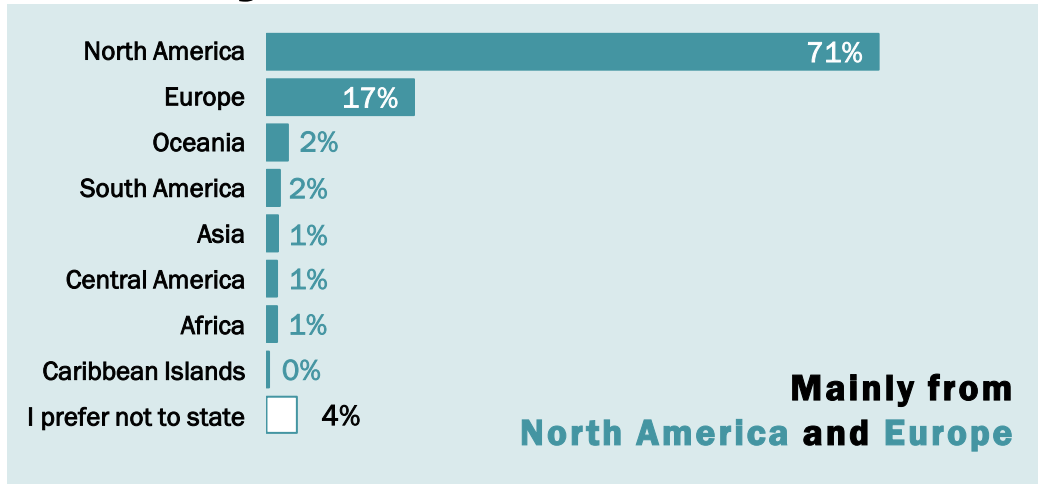
# **The sample**

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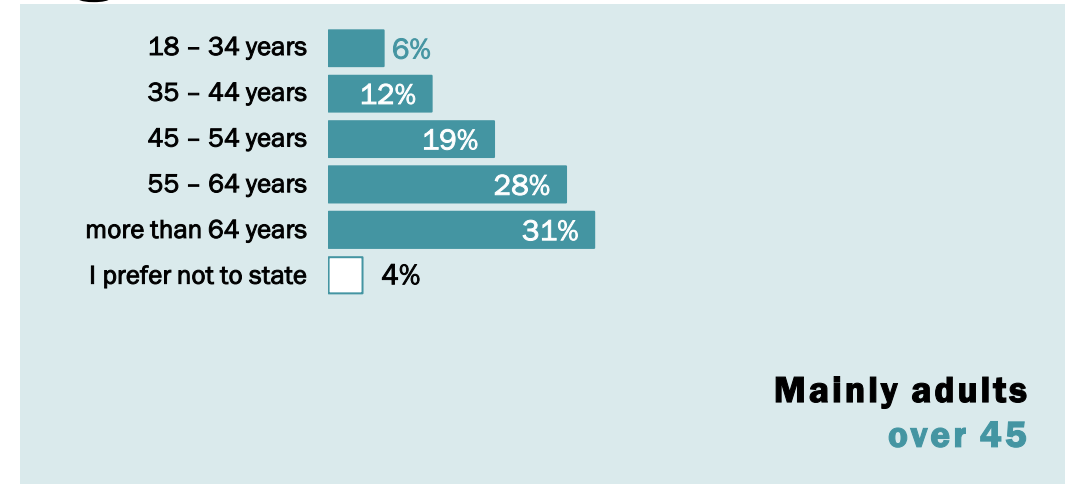
# The sample at a glance /1

968 respondents

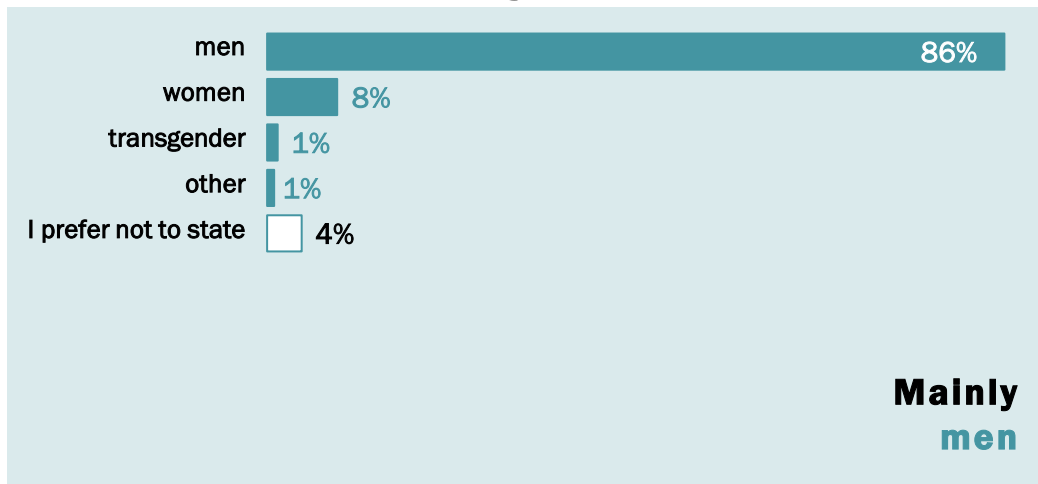
## Country



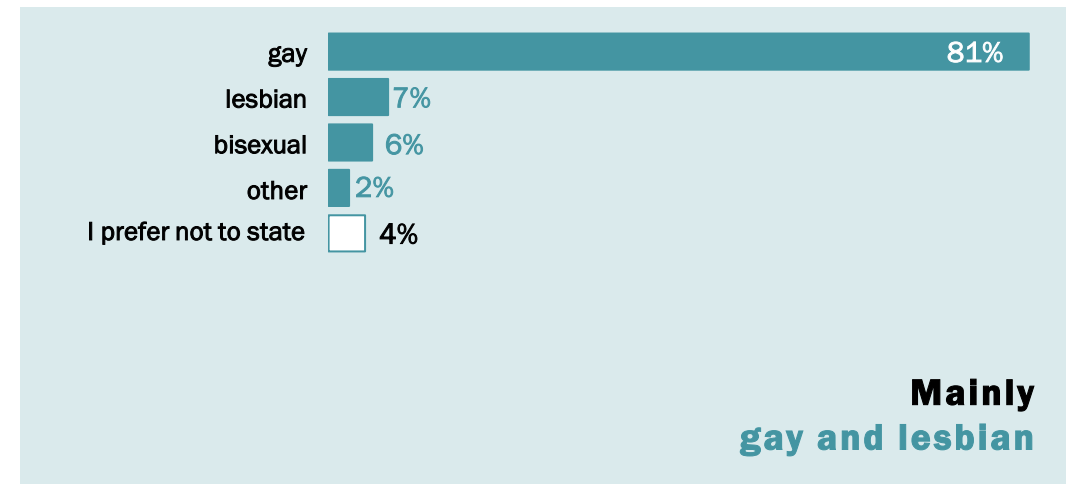
## Age



## Gender Identity



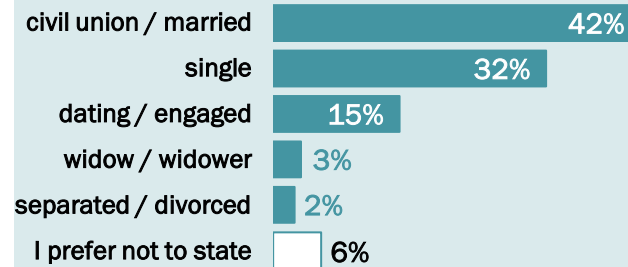
## Sexual Orientation



# The sample at a glance /2

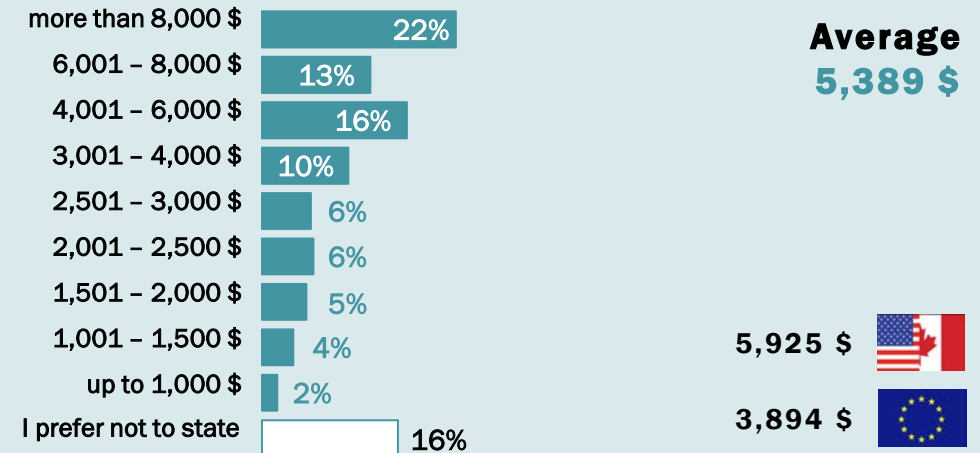
968 respondents

## Marital Status

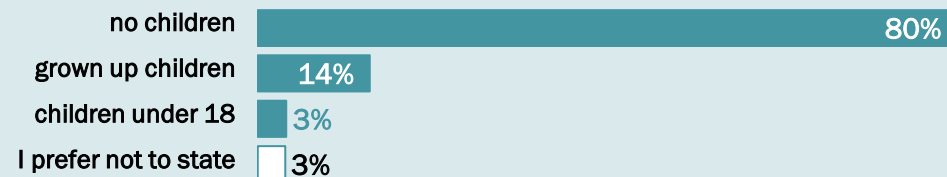


**Mainly partnered**  
(married, in a civil union or engaged)

## Individual Net Monthly Income

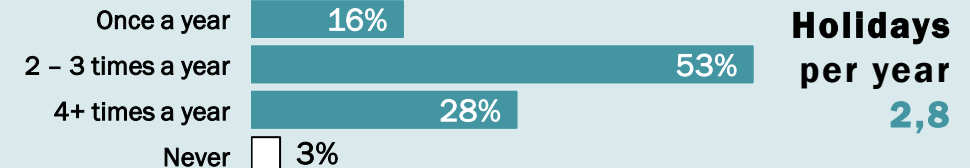


## Children



**Mainly with no children**

## Holiday Experiences



**A group of passionate holiday makers**

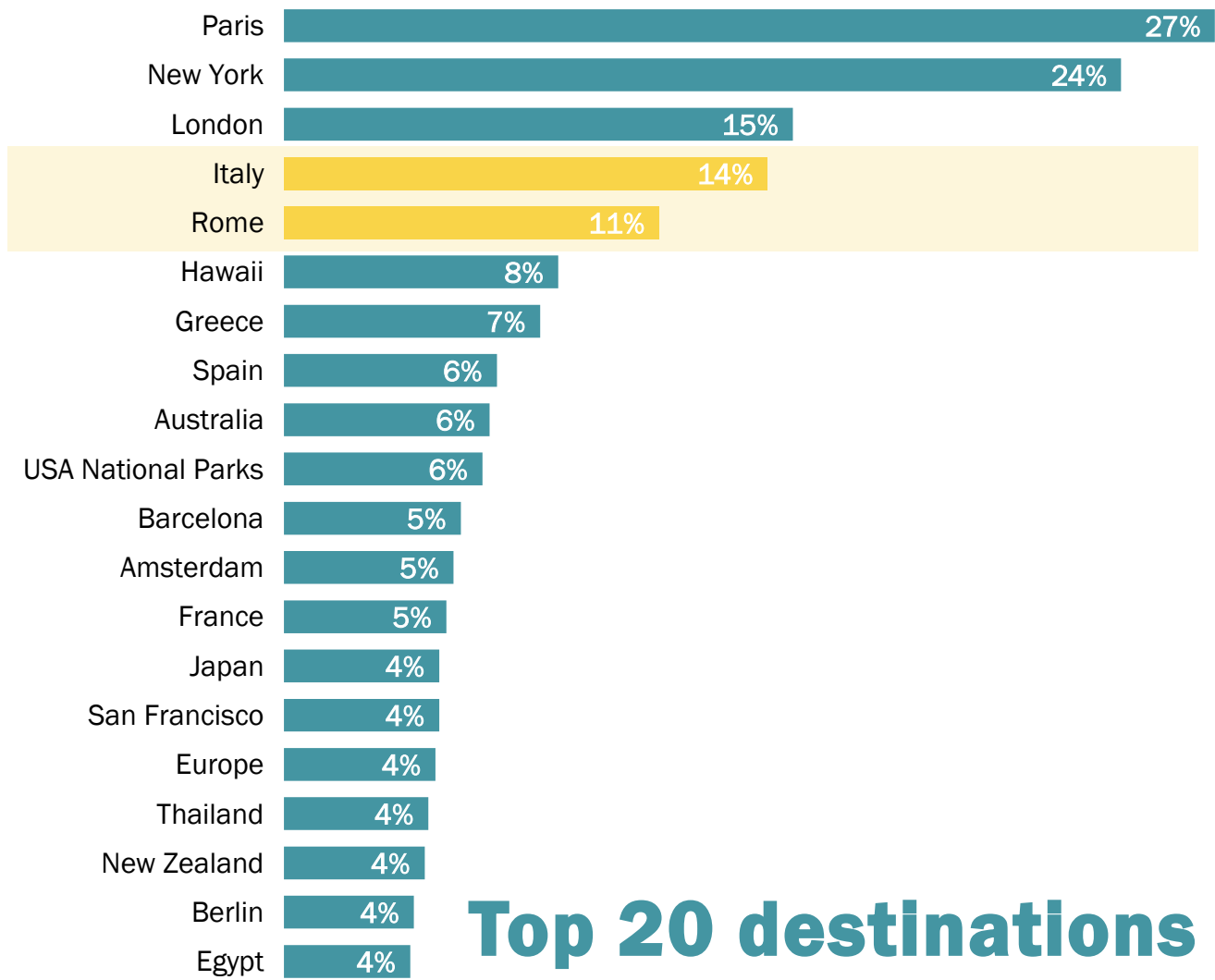


# **Top of mind destinations & Destinations' LGBTQ+ friendliness**

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# Top of mind destinations

In your opinion, what are the 3 destinations everyone should visit at least once in their life? (open answer)



## Top 20 destinations

n. 968 | Percentage on the number of respondents

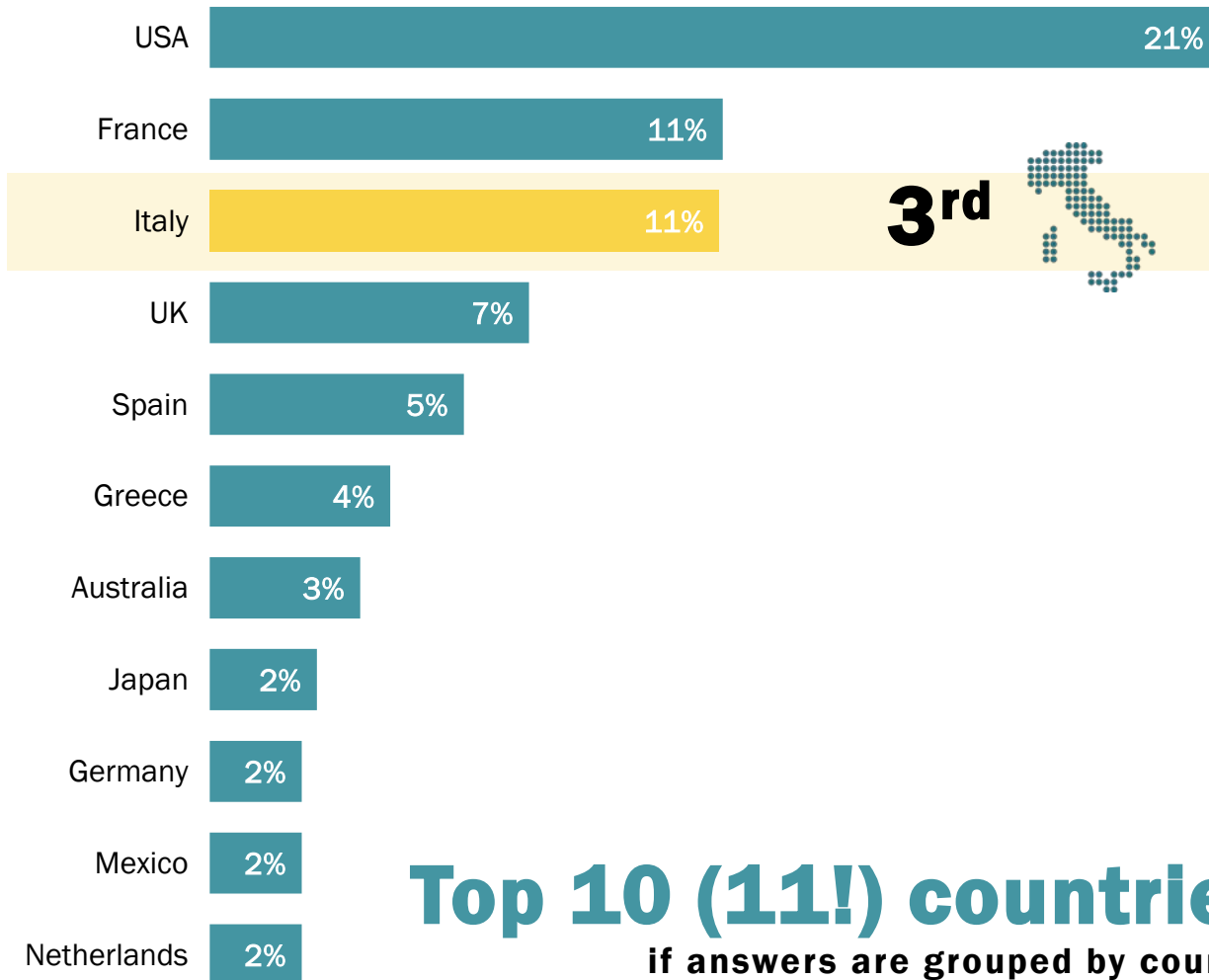
4<sup>th</sup>



5<sup>th</sup>



# Countries not to miss



**Top 10 (11!) countries**  
if answers are grouped by country

n. 2.904 | Percentage on the number of answers

In your opinion, what are the 3 destinations everyone should visit at least once in their life? (open answer)

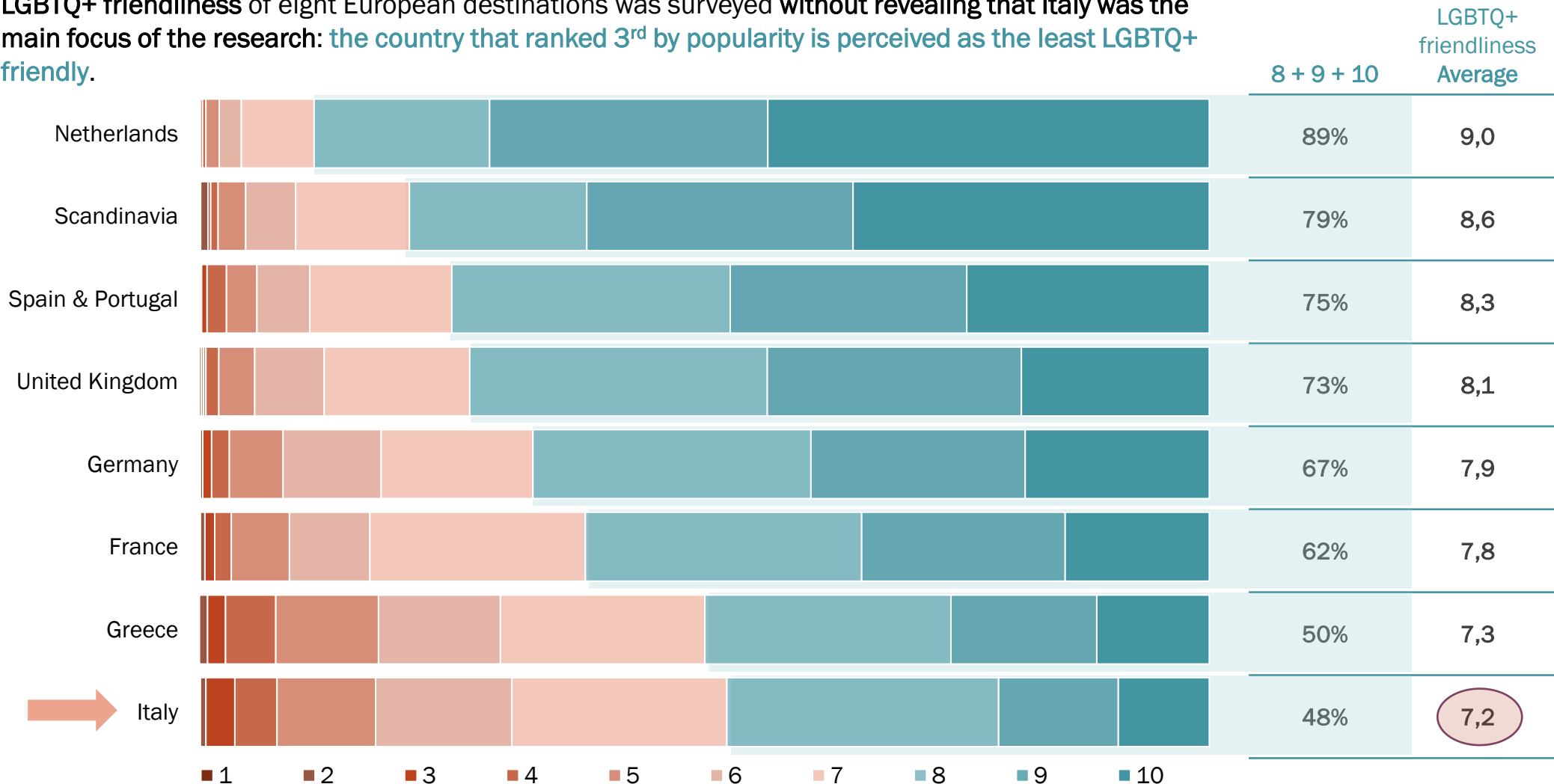
Country	Destinations (number of answers)
<b>USA</b> (604)	New York (232), Hawaii (76), National Parks (55), San Francisco (43), Alaska (34), USA (27), Key West (16), Other 37 destinations (121)
<b>France</b> (307)	Paris (258), France (45), Other 4 destinations (4)
<b>Italy</b> (305)	<b>Italy</b> (134), <b>Rome</b> (104), <b>Venice</b> (32), Other 14 destinations (35)
<b>UK</b> (191)	London (141), UK (28), Other 9 destinations (22)
<b>Spain</b> (152)	Spain (59), Barcelona (49), Madrid (16), Other 4 destinations (28)
<b>Greece</b> (108)	Greece (71), Mykonos (16), Other 5 destinations (21)
<b>Australia</b> (90)	Australia (57), Sydney (22), Other 5 destinations (11)
<b>Japan</b> (64)	Japan (43), Tokyo (16), Other 2 destinations (5)
<b>Germany</b> (55)	Berlin (36), Germany (14), Other 4 destinations (5)
<b>Mexico</b> (55)	Mexico (26), Puerto Vallarta (16), Other 9 destinations (13)
<b>Netherlands</b> (55)	Amsterdam (47), Netherlands (8)



# LGBTQ+ friendliness /1

How much do you think the following countries are *LGBTQ+ friendly* and could offer a *nice holiday experience* to *LGBTQ+ travelers*?

LGBTQ+ friendliness of eight European destinations was surveyed without revealing that Italy was the main focus of the research: the country that ranked 3<sup>rd</sup> by popularity is perceived as the least LGBTQ+ friendly.



n. 968 | Scale: 1 Not LGBTQ+ friendly at all - 10 Very LGBTQ+ friendly

Scandinavia = Norway, Sweden, Denmark, Finland, Iceland, Scandinavia

# Focus on Italy

How much do you think the following countries are *LGBTQ+ friendly* and could offer a nice holiday experience to *LGBTQ+ travelers*?

## LGBTQ+ friendliness



**Average score: 7,2**

... but the **perception** of Italy as an LGBTQ+ friendly destination changes according to **travel experiences** in Italy:

**Never been to Italy 6,9**

**First timers 7,4**

**Repeaters 7,2**

Photo: Wikipedia | Mnemoc

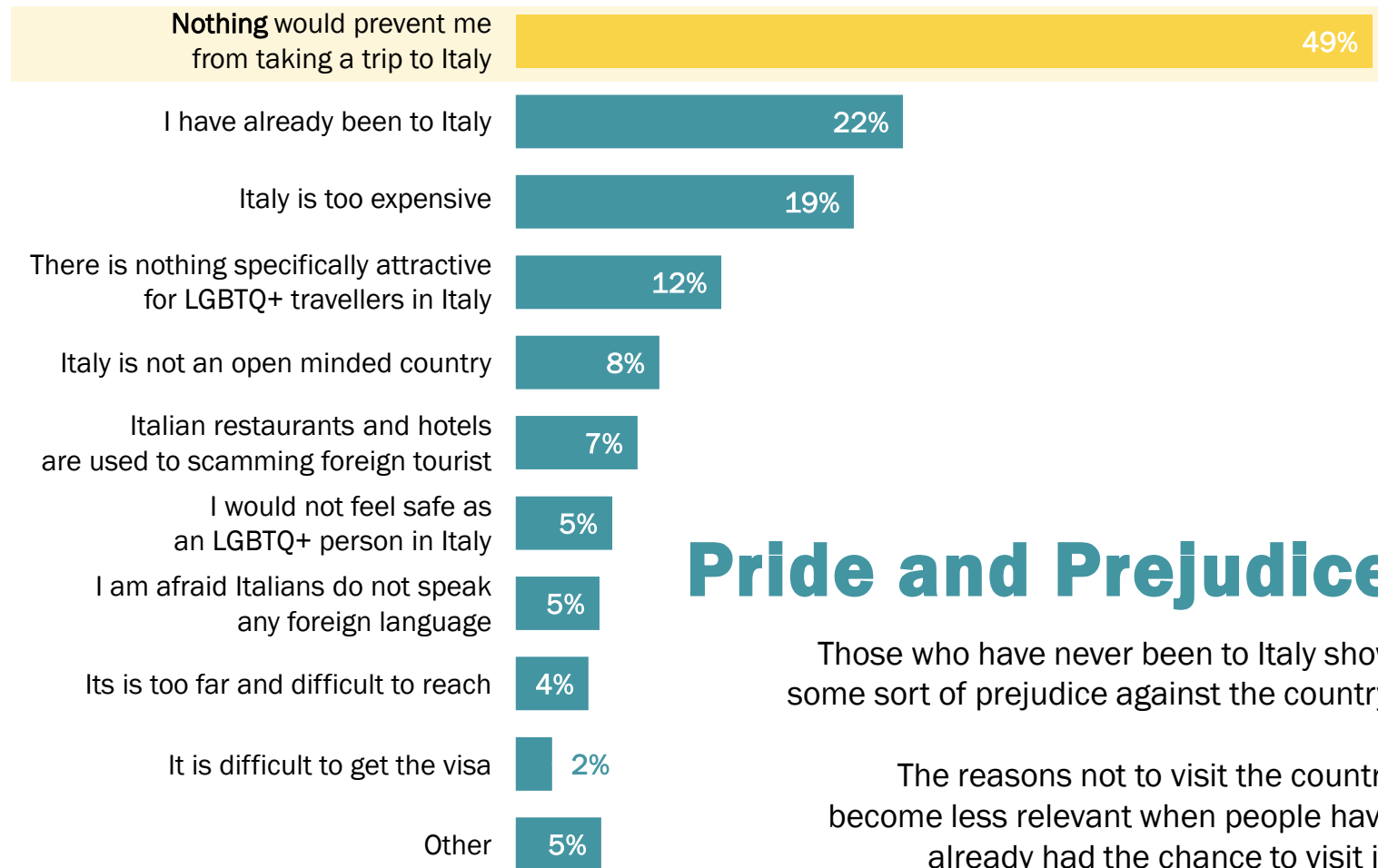
n. 968 | Scale: 1 Not LGBTQ+ friendly at all - 10 Very LGBTQ+ friendly



# **LGBTQ+ travelers' perception on Italy**

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## Reasons not to visit



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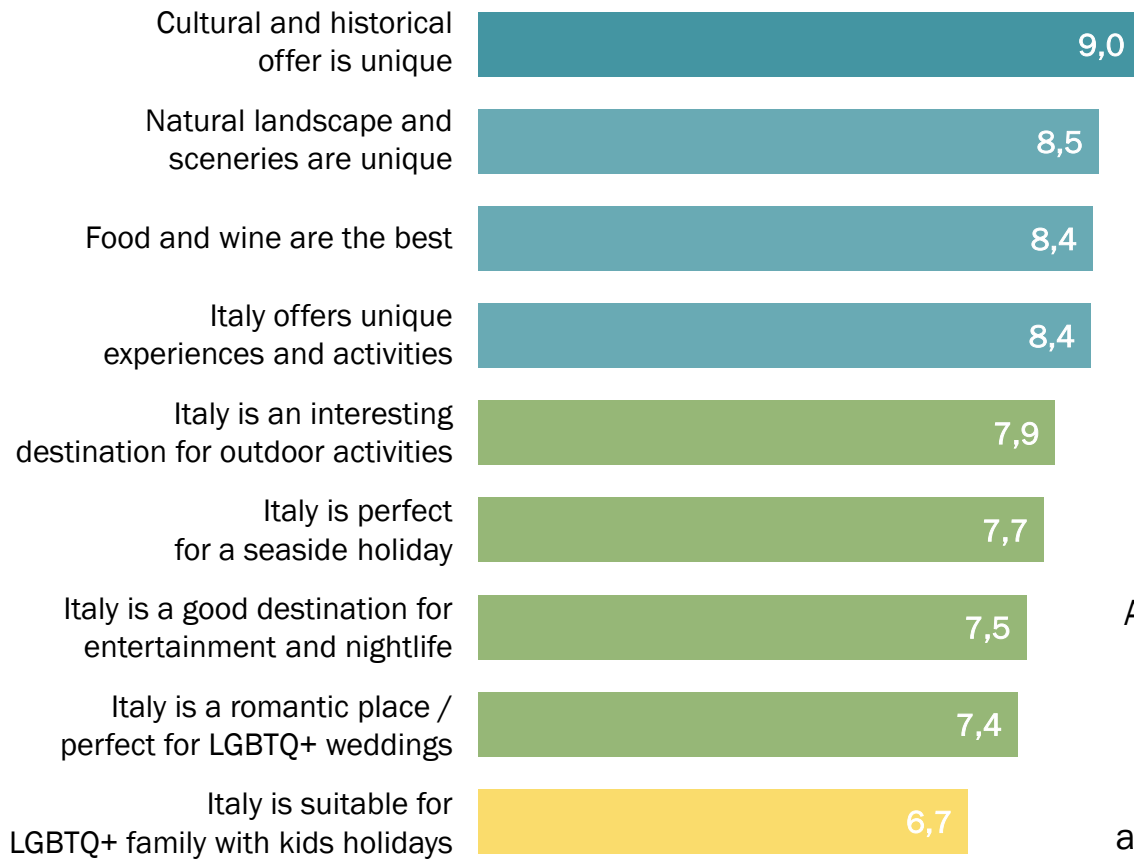
## Pride and Prejudice

Those who have never been to Italy show some sort of prejudice against the country.

The reasons not to visit the country become less relevant when people have already had the chance to visit it.

	Never been	First timers	Repeaters
Nothing would prevent me from taking a trip to Italy	44%	43%	53%
I have already been to Italy	-	31%	28%
Italy is too expensive	29%	19%	15%
There is nothing specifically attractive for LGBTQ+ travellers in Italy			
Italy is not an open minded country	10%	5%	8%
Italian restaurants and hotels are used to scamming foreign tourist	8%	6%	7%
I would not feel safe as an LGBTQ+ person in Italy	9%	6%	4%
I am afraid Italians do not speak any foreign language	10%	3%	3%
Its is too far and difficult to reach	9%	4%	2%
It is difficult to get the visa	5%	1%	1%
Other	6%	6%	4%

## Perception of the tourist offer: attractors



n. 968 | Scale: 1 Completely disagree – 10 Completely agree

## A good image

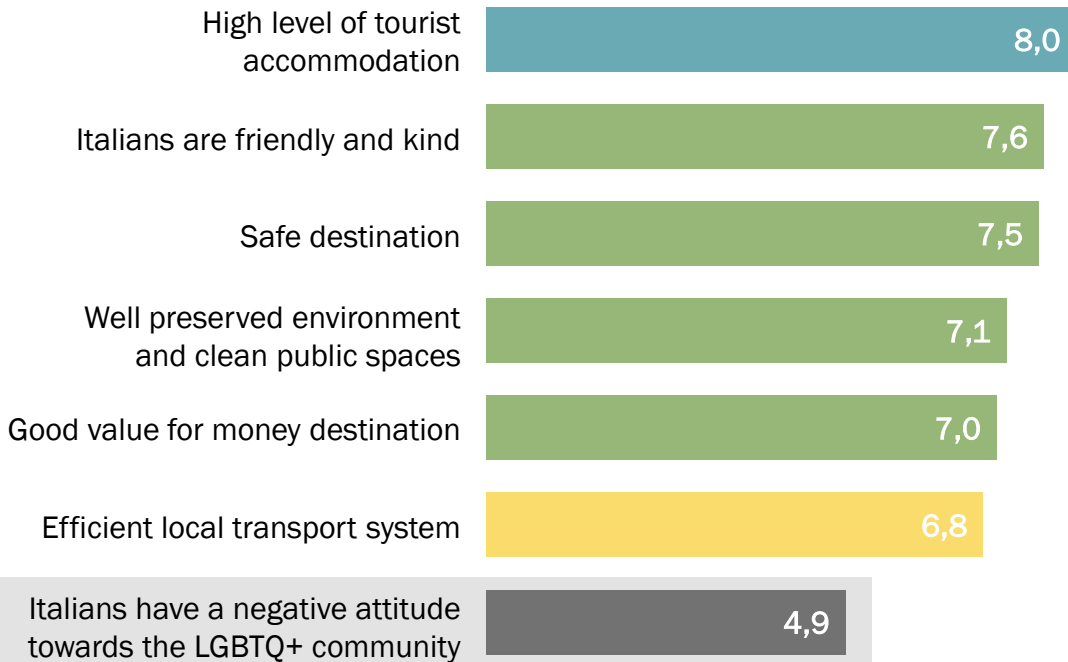
Although Italy gets very high evaluations for its cultural and historical offer, natural landscape, food, wine and unique experiences, the perception of the country is consistently lower amongst those who have never visited it.

	Never been	First timers	Repeaters
Cultural and historical offer is unique	8,5	9,1	9,3
Natural landscape and sceneries are unique	8,1	8,6	8,6
Food and wine are the best	7,8	8,3	8,7
Italy offers unique experiences and activities	7,8	8,5	8,5
Italy is an interesting destination for outdoor activities	7,5	7,8	8,0
Italy is perfect for a seaside holiday	7,4	7,6	7,9
Italy is a good destination for entertainment and nightlife	7,1	7,5	7,6
Italy is a romantic place / perfect for LGBTQ+ weddings	6,7	7,4	7,6
Italy is suitable for LGBTQ+ family with kids holidays	6,1	6,7	6,9

# Italy

According to your knowledge and experience of *Italy*, how much do you agree with the following statements regardless of whether you have visited Italy or not?

## Perception of the tourist offer: country



It's a negative sentence: a low average is a positive score!

## A slightly less good image

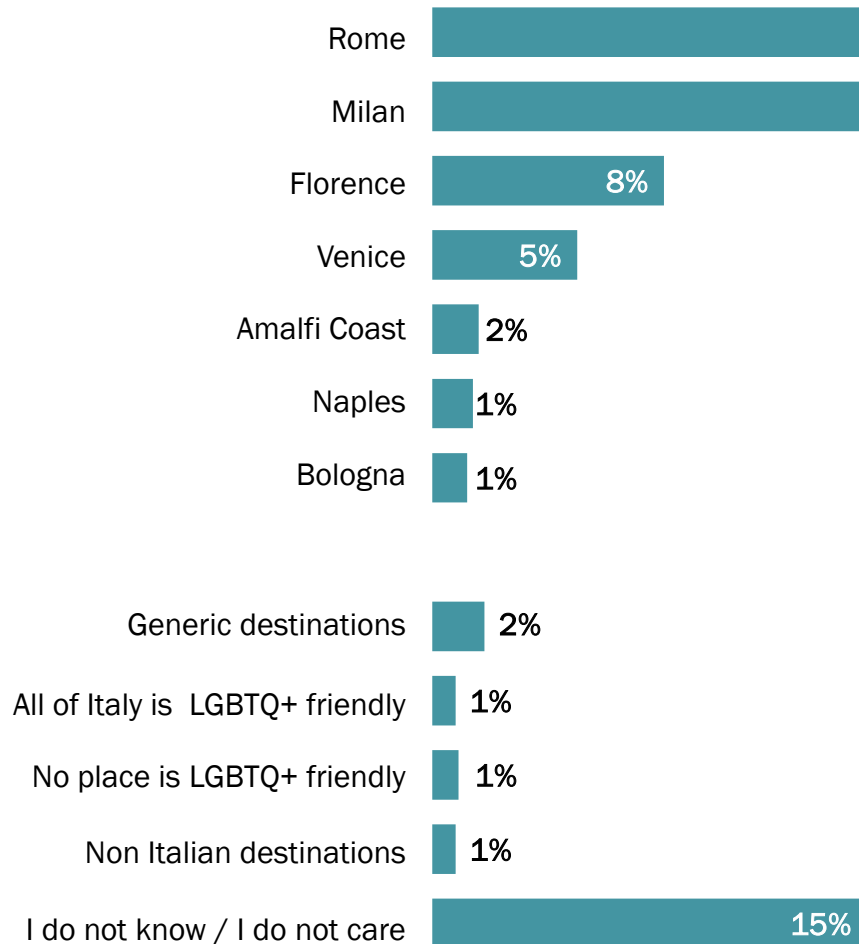
The tourist support system and the country are perceived in a positive way (though not as good as its attractors).

There is again a problem of perception amongst those who have never been to the country.

	Never been	First timers	Repeaters
High level of tourist accommodation	7,5	8,2	8,2
Italians are friendly and kind	7,0	7,6	7,9
Safe destination	7,0	7,7	7,8
Well preserved environment and clean public spaces	6,8	7,2	7,2
Good value for money destination	6,4	7,1	7,1
Efficient local transport system	6,5	6,9	6,9
Italians have a negative attitude towards the LGBTQ+ community	5,3	4,8	4,8

n. 968 | Scale: 1 Completely disagree – 10 Completely agree

## LGBTQ+ most friendly places



n. 968

### The most LGBTQ+ friendly regions (if destinations are grouped by region)

- Lazio (33%)
- Lombardy (24%)
- Tuscany (11%)
- Veneto (6%)
- Campania (4%)
- Emilia Romagna (2%)

### Regions whose destinations were NOT mentioned

- Abruzzo
- Basilicata
- Marche
- Molise
- Valle d'Aosta

Other destinations	Percentage
Tuscany	1%
Capri, Torre del Lago	0,7%
Viareggio	0,6%
Sicily	0,5%
Torino, Verona	0,4%
Italian Riviera, Portofino, Puglia, Sorrento, Trieste	0,3%
Catania, Cinque Terre, Emilia Romagna, Gallipoli, Sanremo	0,2%
Calabria, Campania, Genoa, Ischia, Merano, Noto, Padua, Palermo, Pisa, Procida, Rimini, Sardinia, Siena, Spoleto, Veneto	0,1%



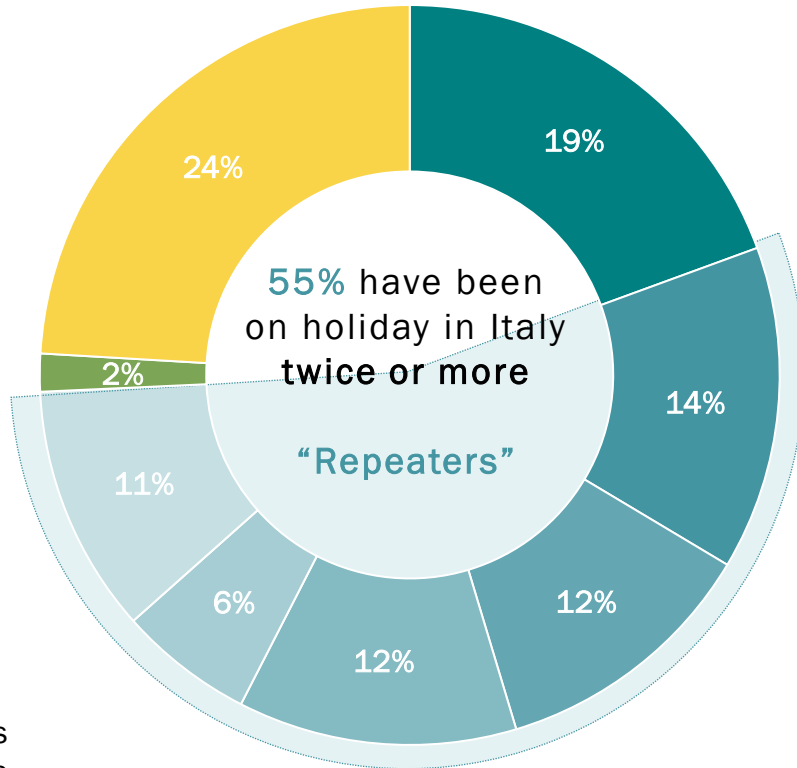
# **Travel behavior of LGBTQ+ tourists in Italy**

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# Holidays in Italy

## Travel experience

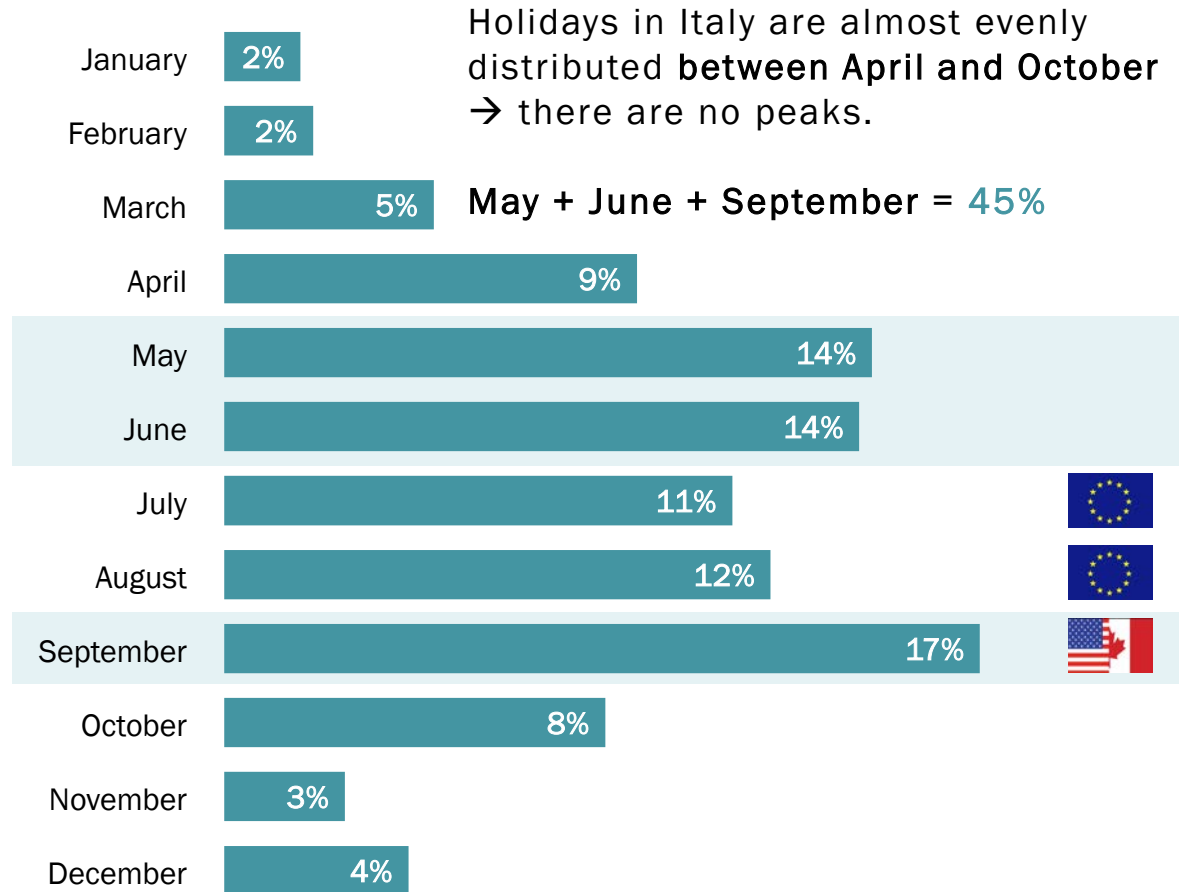


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- 1 time
- 2 times
- 3 times
- 4 to 5 times
- 6 to 9 times
- 10 or more times
- I have been to Italy ONLY on business trips
- I have never been to Italy

How many times have you been to Italy on holiday?  
 In which month of the year was your last Italian holiday?

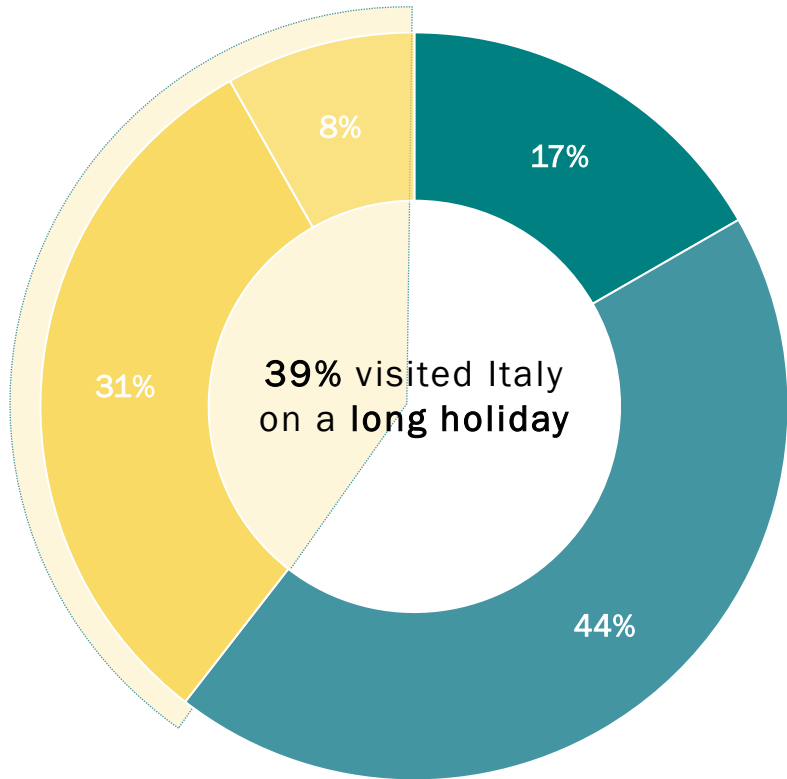
## Period



n. 719 | Respondents who have been on holiday in Italy at least once

# Holidays in Italy

## Length

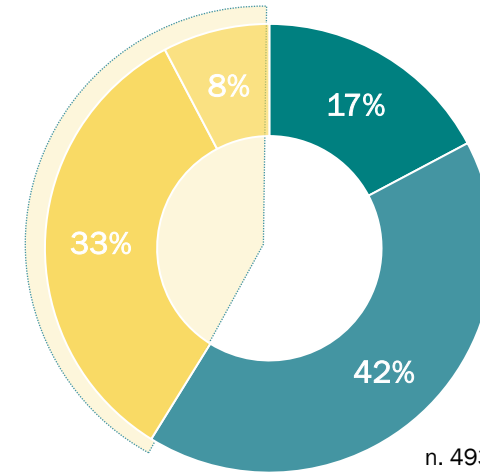


n. 719

- 1 - 3 nights
- 4 - 7 nights
- 8 - 14 nights
- more than 15 nights

**7,7 nights**

How many *nights* did you spend in Italy during your last holiday?

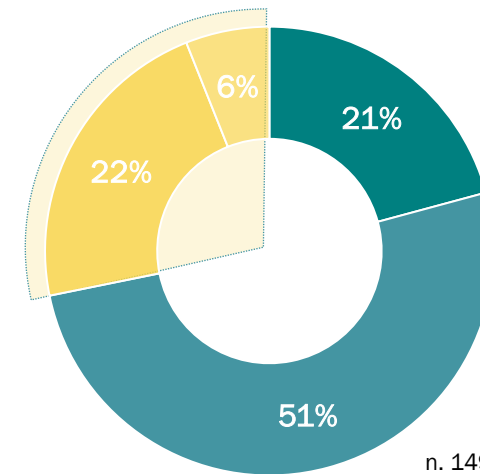


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North America

**41%**  
Long holidays

**7,8 nights**  
Average length



n. 149

Europe

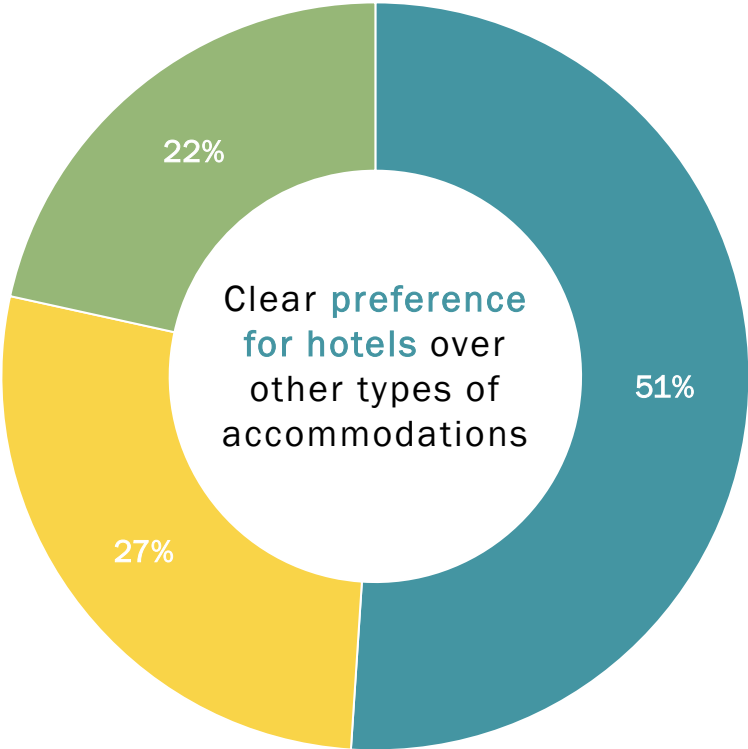
**28%**  
Long holidays

**7 nights**  
Average length

# Holidays in Italy

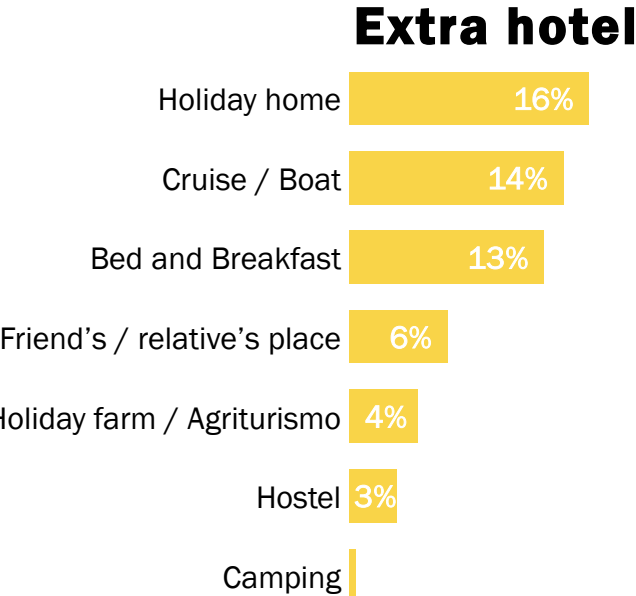
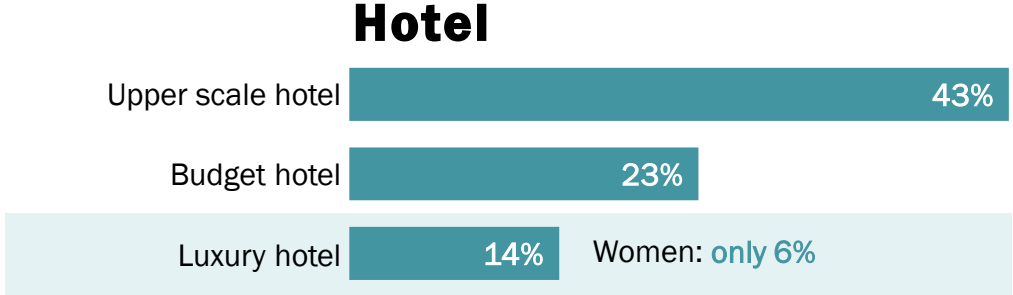
## Accommodation

Where did you *stay* during your *last Italian holiday*?





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- Hotel (only)
- Extra hotel (only)
- Both (hotel and extra hotel)



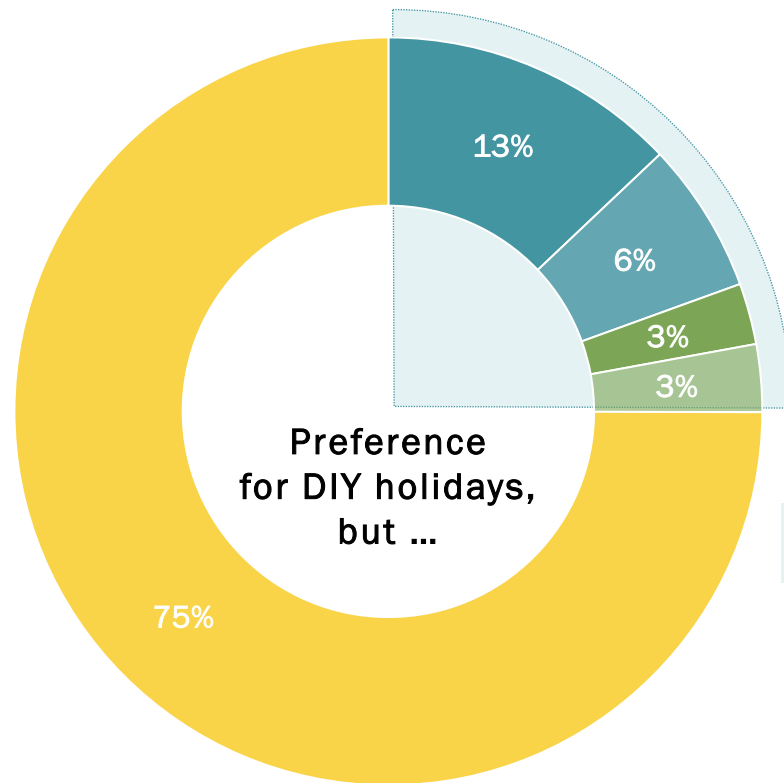
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Upper scale hotel	45%	36%
Budget hotel	23%	20%
Luxury hotel	13%	13%
Holiday home	16%	14%
Cruise / Boat	16%	6%
Bed and Breakfast	12%	13%
Friend's / relative's place	5%	9%
Holiday farm / Agriturismo	3%	7%
Hostel	2%	3%
Camping	1%	-



# Holidays in Italy

How did you *organize* your last trip to Italy?

## Trip organization



25% of respondents (mainly non male, first timers and North American) organized their holiday to Italy through a **travel agent / tour operator**, but with **no preference for specialized LGBTQ+ travel agents / tour operators** (only 6%).

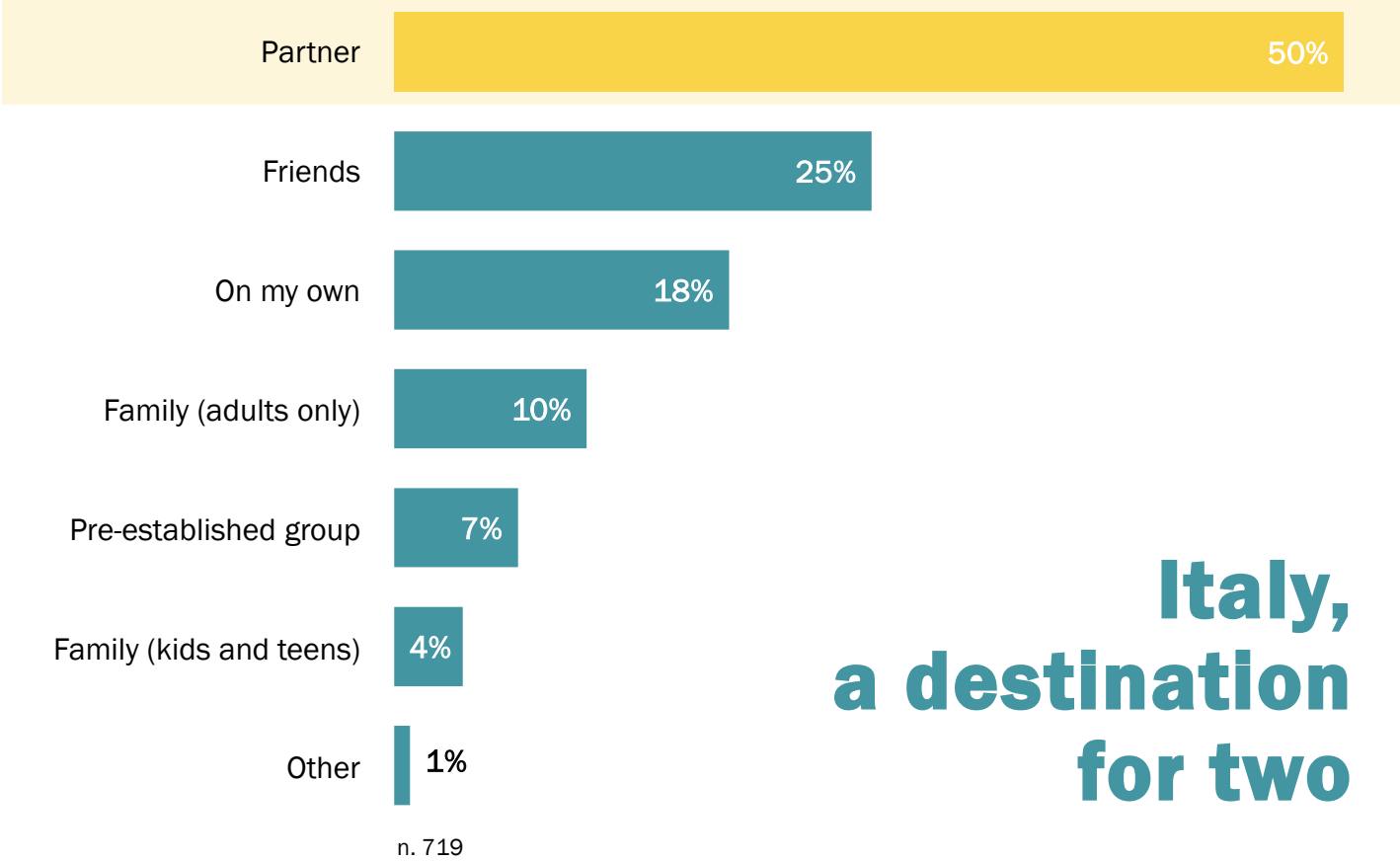
	Men	Women	Other	First timers	Repeaters		
Existing tour package or tailor-made trip	18%	27%	29%	32%	15%	22%	11%
LGBTQ+ existing tour package or LGBTQ+ tailor-made trip	6%	4%	6%	4%	6%	7%	1%
I bought an existing tour package or a tailor-made trip	24%	31%	35%	36%	21%	29%	12%
I arranged everything by myself	76%	69%	65%	64%	79%	71%	88%

n. 719

- Existing tour package by a generalist Travel Agent / Tour Operator
- Tailormade trip by a generalist Travel Agent / Tour Operator
- Existing tour package designed for LGBTQ+ travelers
- Tailormade trip by an LGBTQ+ specialized Travel Agent / Tour Operator
- I arranged everything by myself



# Holidays in Italy

## Travel companions



**Italy,  
a destination  
for two**

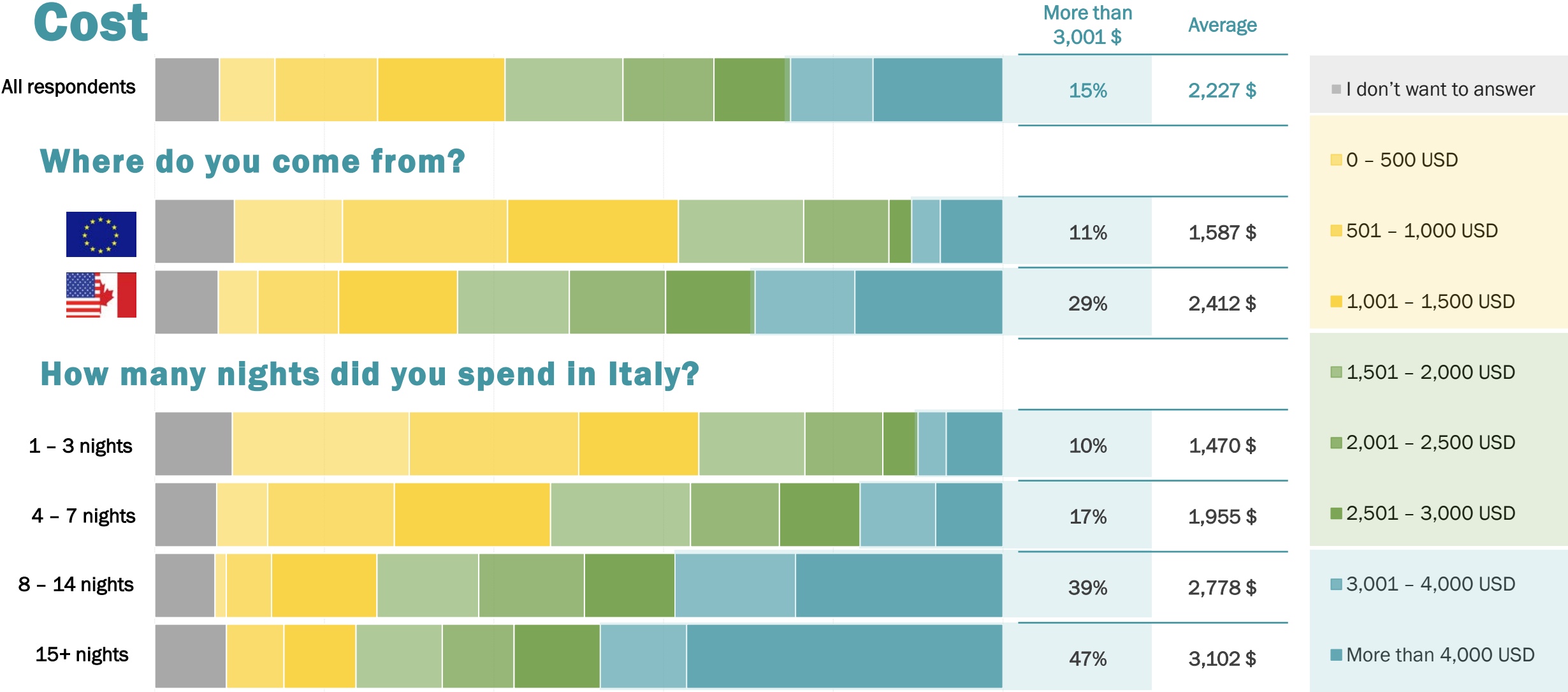
*Whom did you travel with during your last holiday in Italy?*

Men	Women	Other		
51%	46%	46%	50%	54%
26%	28%	11%	27%	21%
18%	15%	11%	17%	17%
9%	13%	20%	10%	10%
5%	13%	17%	8%	3%
3%	4%	6%	3%	3%
1%	-	3%	-	2%

# Holidays in Italy

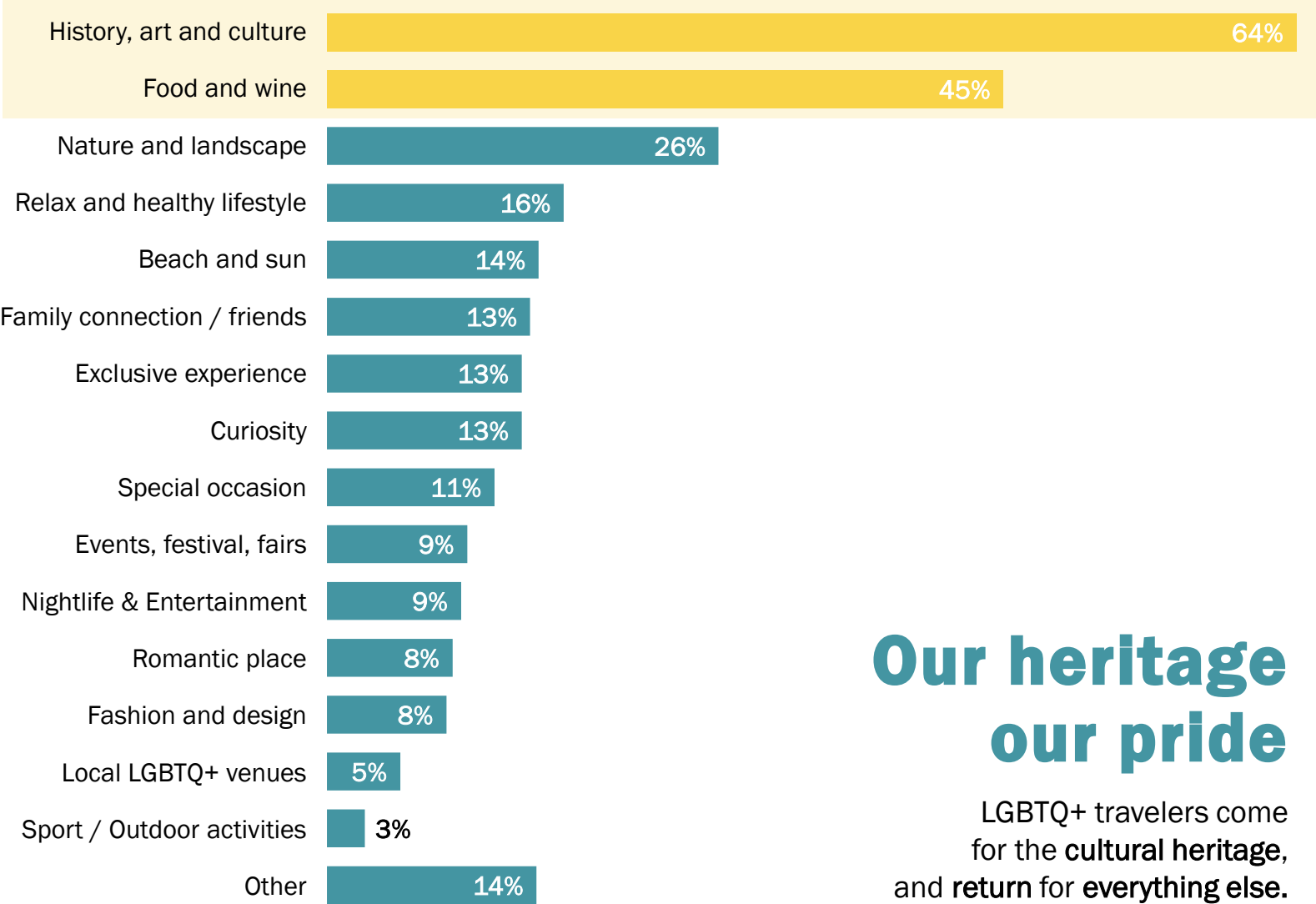
How much did you *pay* for your *Italian* vacation *NOT* including the cost for *international transfers*?

## Cost



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# Holidays in Italy: reasons why





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## Our heritage our pride

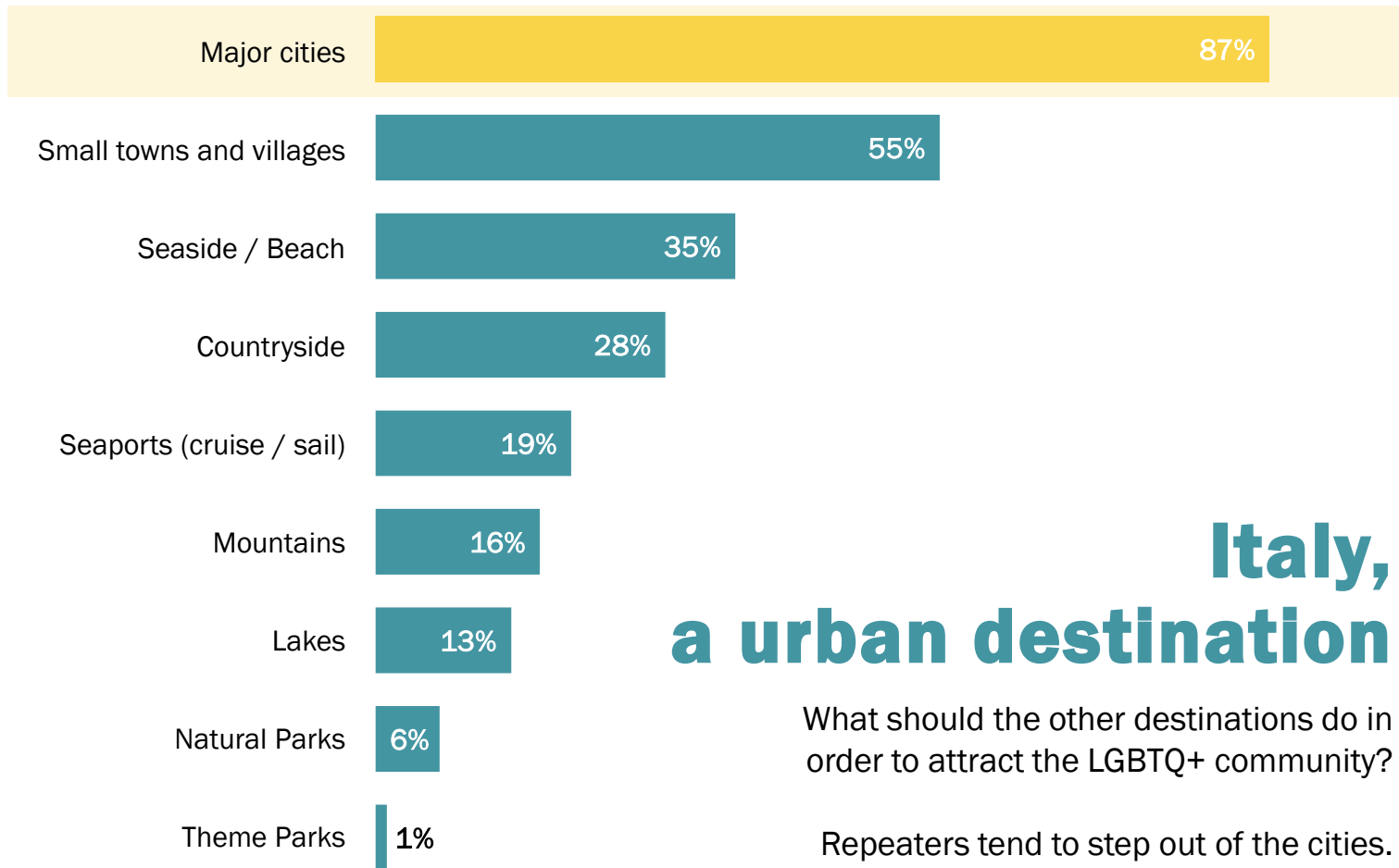
LGBTQ+ travelers come for the **cultural heritage**, and return for **everything else**.

### Why did you last go to Italy on holiday?

	First timers	Repeaters		
	64%	65%	70%	46%
	34%	49%	47%	39%
	18%	29%	24%	32%
	9%	18%	14%	19%
	6%	17%	10%	26%
	10%	15%	13%	17%
	12%	13%	14%	8%
	24%	9%	13%	13%
	9%	12%	12%	8%
	4%	11%	8%	9%
	9%	9%	9%	10%
	6%	9%	8%	10%
	4%	9%	8%	6%
	3%	5%	5%	4%
	2%	3%	2%	6%
	13%	14%	15%	11%

# Holidays in Italy

## Visited places (by type)





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## Italy, a urban destination

What should the other destinations do in order to attract the LGBTQ+ community?

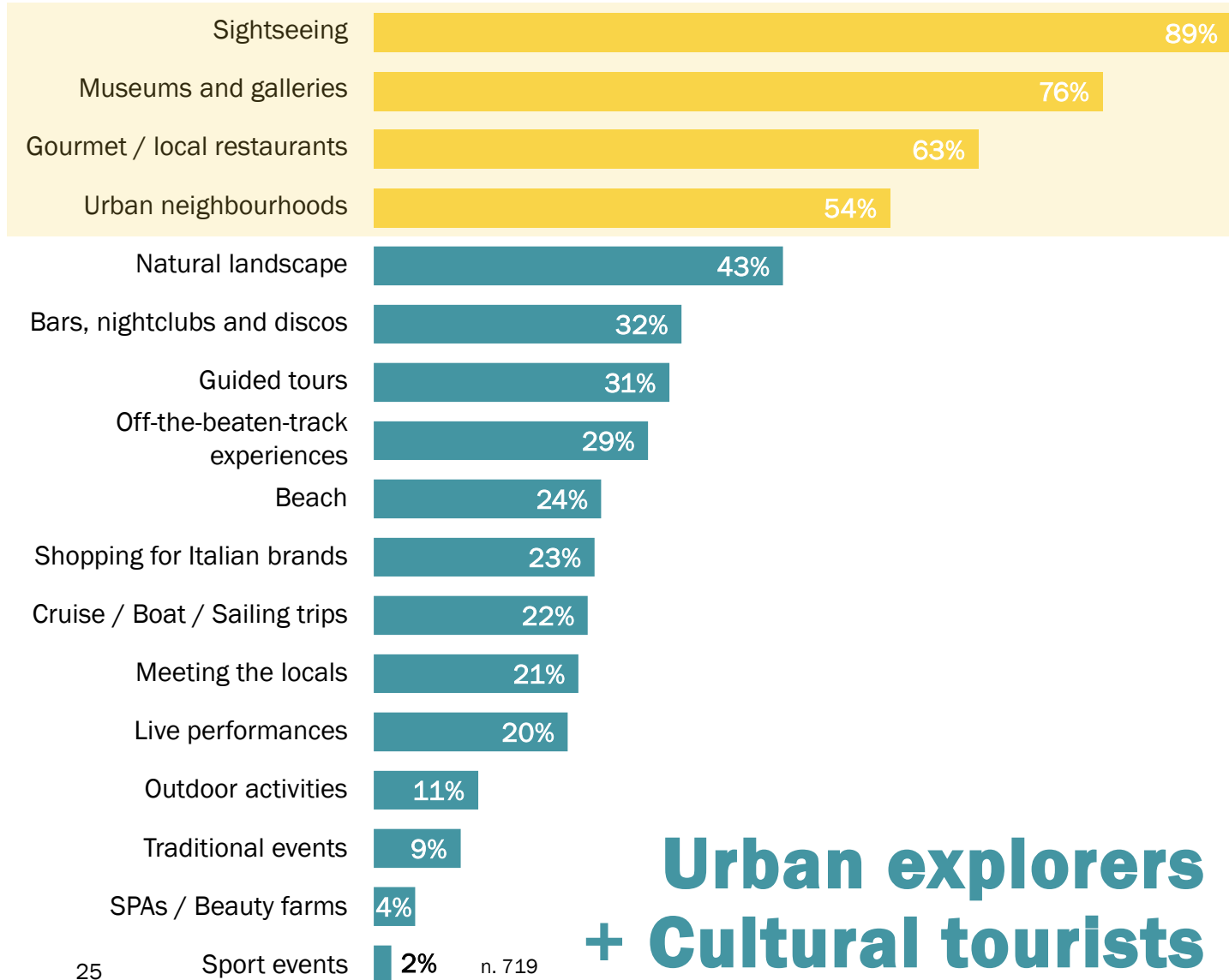
Repeaters tend to step out of the cities.

What *type of places* did you visit during your last holiday in *Italy*?

	First timers	Repeaters		
Major cities	90%	86%	91%	72%
Small towns and villages	40%	60%	57%	48%
Seaside / Beach	21%	40%	32%	42%
Countryside	20%	31%	29%	28%
Seaports (cruise / sail)	15%	20%	21%	11%
Mountains	12%	17%	14%	22%
Lakes	7%	15%	12%	16%
Natural Parks	5%	7%	5%	11%
Theme Parks	1%	1%	-	3%





# Holidays in Italy: activities



**Urban explorers  
+ Cultural tourists**

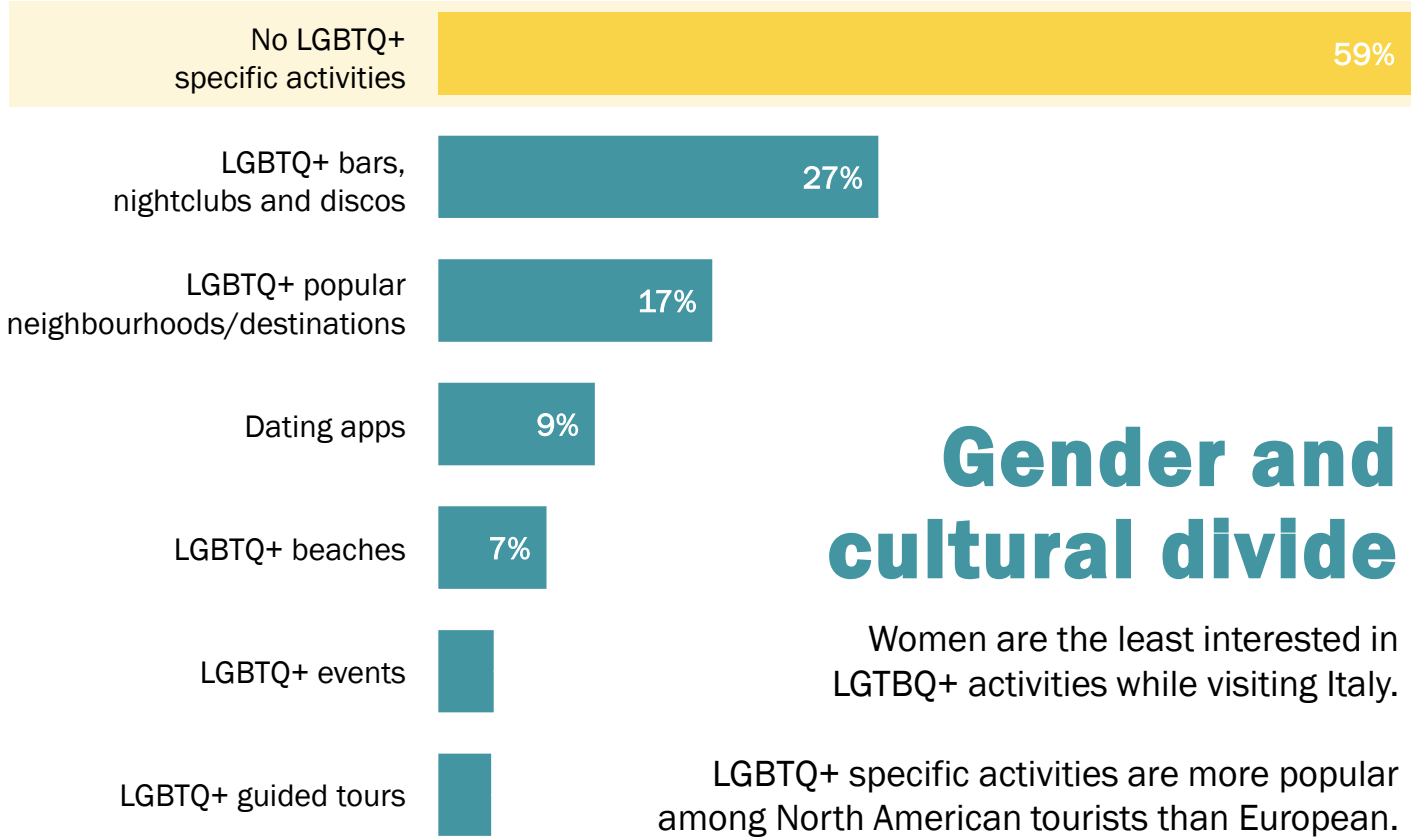
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What did you *do* during your *Italian* holiday?

	Men	Women	Other		
	90%	85%	83%	93%	76%
	76%	80%	69%	82%	54%
	64%	63%	46%	66%	58%
	54%	59%	43%	58%	41%
	42%	46%	40%	42%	45%
	33%	22%	20%	34%	30%
	31%	31%	17%	37%	14%
	30%	15%	31%	34%	12%
	24%	20%	20%	20%	34%
	23%	20%	23%	25%	11%
	23%	19%	17%	23%	19%
	22%	11%	26%	25%	7%
	20%	19%	20%	21%	16%
	12%	4%	6%	12%	11%
	9%	6%	11%	9%	8%
	4%	7%	9%	3%	10%
	2%	-	6%	2%	2%

# Holidays in Italy

## LGBTQ+ activities





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## Gender and cultural divide

Women are the least interested in LGBTQ+ activities while visiting Italy.

LGBTQ+ specific activities are more popular among North American tourists than European.

Did you do any *LGBTQ+ specific* activity during your *Italian* holiday?

	Men	Women	Other		
No LGBTQ+ specific activities	57%	74%	63%	60%	55%
LGBTQ+ bars, nightclubs and discos	28%	15%	23%	28%	21%
LGBTQ+ popular neighbourhoods/destinations	17%	13%	11%	19%	11%
Dating apps	10%	2%	6%	7%	19%
LGBTQ+ beaches	7%	-	9%	6%	8%
LGBTQ+ events	3%	2%	9%	2%	6%
LGBTQ+ guided tours	3%	4%	3%	3%	2%

# Holidays in Italy

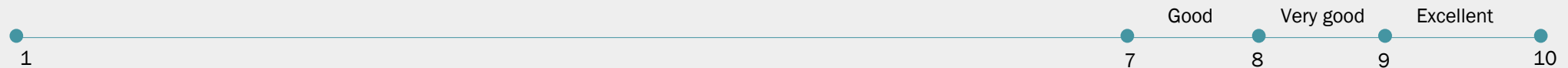
How *satisfied* were you with your overall *holiday experience in Italy*?  
How likely is it that you would *recommend a holiday in Italy to a friend*?

## Performance

The **performance** of the holiday experience in Italy has been measured according to **three indicators**:

1

**Average satisfaction** is the average of the answers to the question «*How satisfied were you with your overall experience in Italy?*» on a scale of 1 (Not at all satisfied) to 10 (Very satisfied).



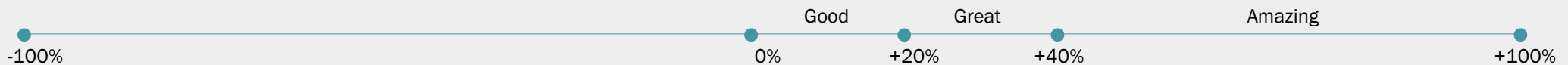
2

**Average recommendation** is the average of the answers to the question «*How likely is it that you would recommend a holiday in Italy to a friend?*» on a scale of 0 (Absolutely no) to 10 (Absolutely yes).



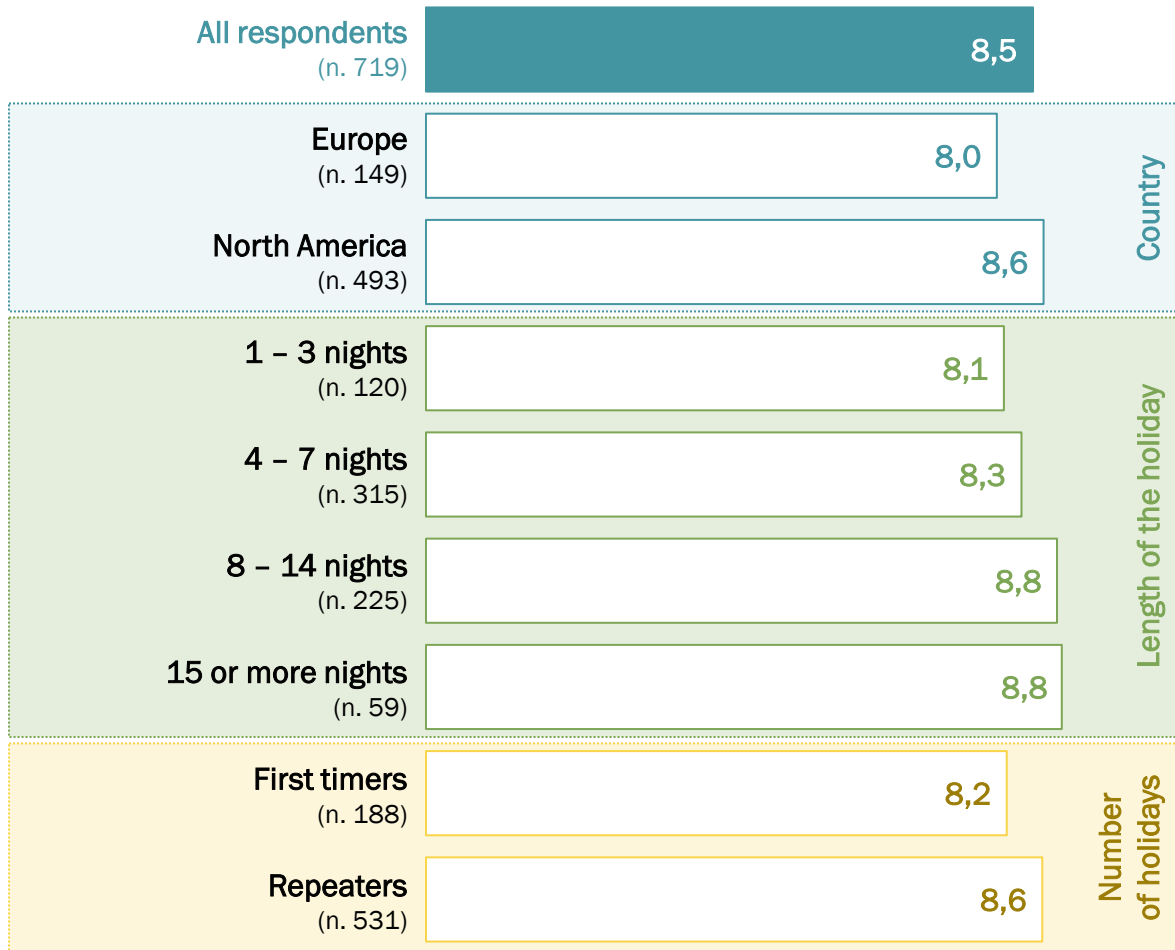
3

**Net Promoter Score (NPS)** is the difference between the percentage of promoters and the percentage of detractors of a holiday in Italy. **Promoters** are those who would recommend a holiday in Italy to a friend with 9-10 answers while **detractors** are those who would «recommend» a holiday in Italy with 0-6 answers.



# Holidays in Italy

## Satisfaction



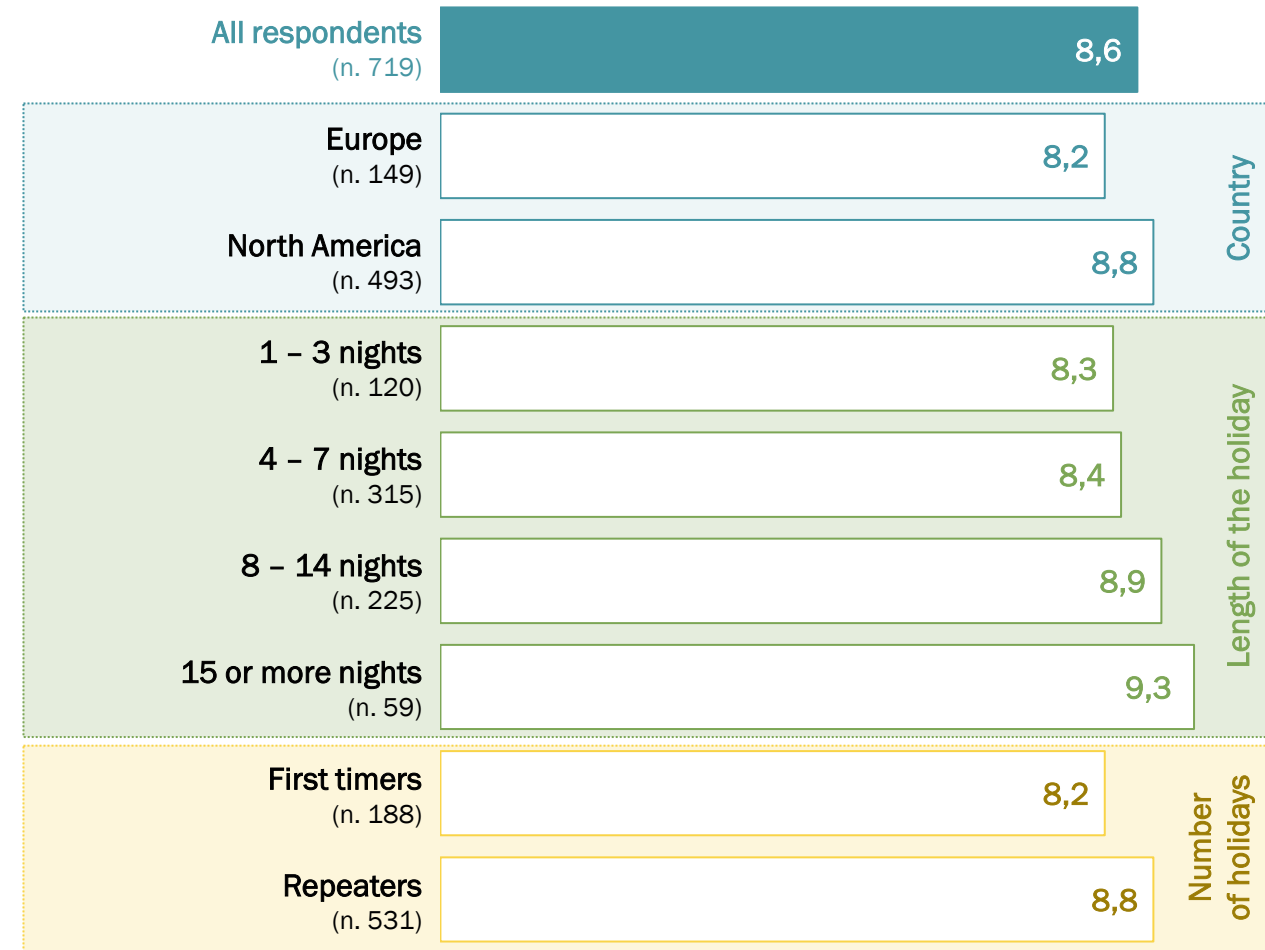
n. 719

1 Not at all satisfied

Very satisfied 10

How *satisfied* were you with your overall *holiday experience in Italy*?  
How likely is it that you would *recommend a holiday in Italy to a friend*?

## Recommendation



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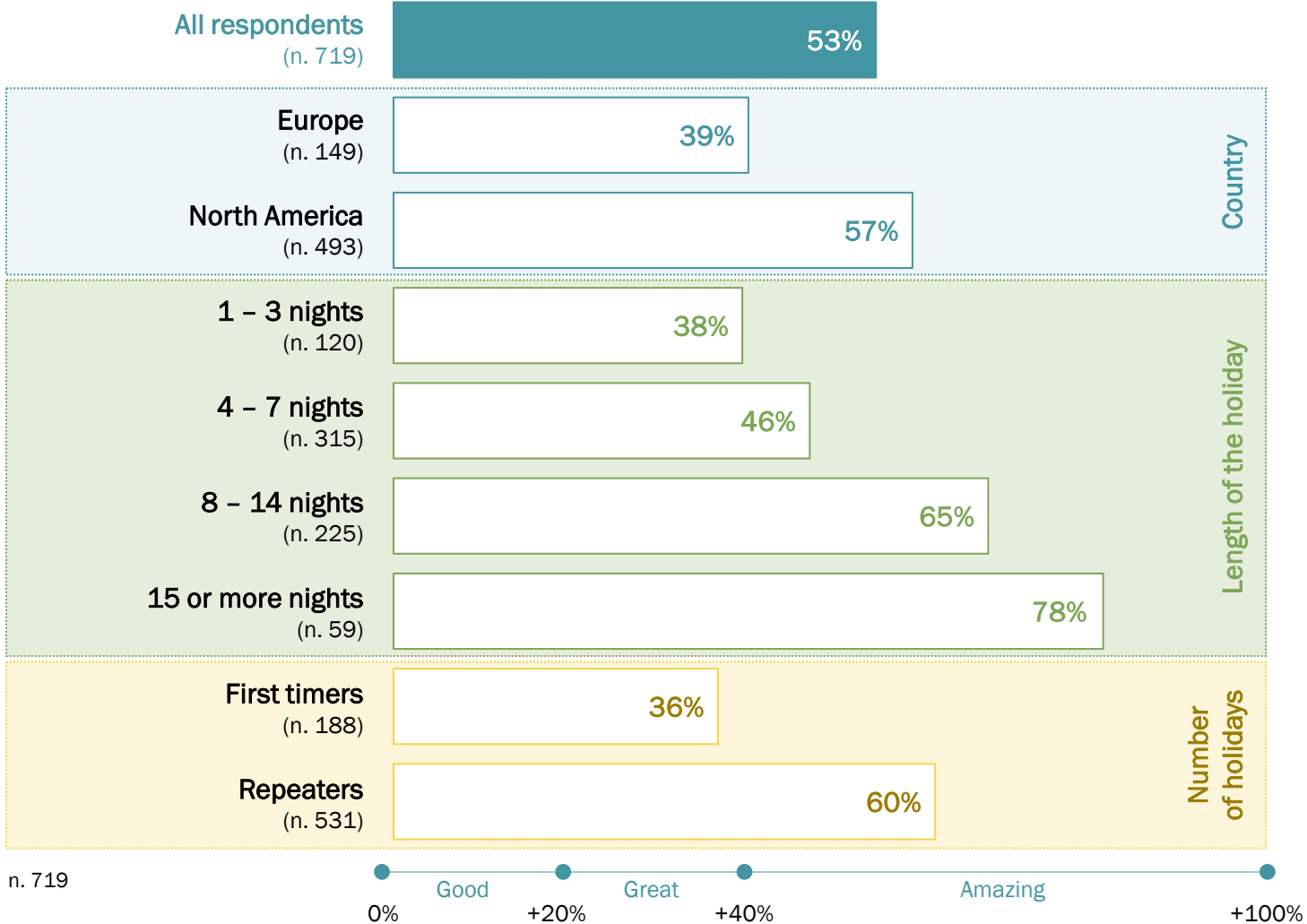
0 Absolutely no

Absolutely yes 10

# Holidays in Italy

How likely is it that you would recommend a holiday in Italy to a friend?

## Net Promoter Score





# **Thank you!**

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**Marianna di Salle**

Coordinator | Master in Tourism Economics and Management  
Bocconi University